



ASPIRIANT

Aspiriant Names Eight New Partners Across San Francisco, Los Angeles, Orange County and Milwaukee Offices

LOS ANGELES [May 10, 2023] - Aspiriant, a leading independent wealth management firm, today announced that eight new partners have been elected to the firm's ownership group. Of Aspiriant's 220 team members, approximately one-third are partners of the firm. The organization's independent employee ownership model aligns the interests of both clients and employees while ensuring clients are served for generations and through all of life's transitions.

The 2023 new partner group helps maintain both the sustainability of Aspiriant's business model and its independence. The newly named partners, based across Aspiriant's key locations in San Francisco, Los Angeles, Orange County and Milwaukee, bring impressive track records, strong credentials and diverse backgrounds to further enhance Aspiriant's commitment to serving high-net-worth and ultra-high-net-worth families across the country.

The eight new Aspiriant partners include:

Dawn Baca, J.D., LL.M. – Director in Strategic Planning (Orange County)

Lynne Born, – Chief Practice Officer (San Francisco)

Laura Boucher, MBA, CPA – Manager in Fund Administration (Milwaukee)

Teresa Greenip, CFP® – Manager in Wealth Management (San Francisco)

Camila Kremer, CFA®, CAIA – Sr. Research Analyst in Investment Strategy & Research (Los Angeles)

Nick Ruzette, CFP® – Manager in Wealth Management (San Francisco)

Matt Sharp, CFP® – Manager in Wealth Management (San Francisco)

Jenny Tsai, CPA – Controller (Los Angeles)

"We are excited to welcome this year's class of partners," said Rob Francais, co-founder and CEO of Aspiriant. "Each year, the appointment of new partners serves as a commitment to the sustainable future of our firm. These partners possess the values that Aspiriant was built upon and will play an active role as our firm continues to break the mold in the wealth management industry."

About Aspiriant

Aspiriant is a leading independent wealth management firm in the U.S. with more than \$13 billion of assets under management and advisement. The firm provides a full range of wealth management services to over 2,200 individuals and families throughout the country with offices in Los Angeles, San Francisco, Silicon Valley, San Diego, Orange County, New York, Boston, Minneapolis, Milwaukee, Cincinnati and Austin. For more information, visit aspiriant.com.